TIPS FOR WRITING HEALTH PLANS

The real voyage of discovery consists not in seeking new landscapes but in having new eyes.

⸺ Marcel Proust

After you have gathered information by reviewing a Personal Health Inventory, asked one or more of the Big Questions and done some shared goal setting to create a SMART goal, it is time to create the Personal Health Plan (PHP).

Here are 12 important points to remember about health planning:

1) **Remember that health plans come in all shapes and sizes.** Sometimes, simply listening and offering compassion are sufficient. Sometimes a plan may be just one SMART goal. Others may be more detailed, if there is time, and cover multiple aspects of the Circle of Health. Be careful not to overwhelm them with too many suggestions at once.

2) **Your first order of business is to synthesize** all the information at your disposal. This includes what you can learn from the medical record, the exam, testing and studies, as well as the patient's body language and what family members or friends tell you.

3) Don't forget that your plans will be better if you **really get to know someone** and if you trust your instincts.

4) A health plan NEVER should be written by a clinician (or even a clinical team) alone. **The patient, as much as possible, should always be a co-author.** Remember that you should create the plan with your entire team. You do not have to go it alone.

5) **Follow up is ALWAYS part** of the plan.

6) **Be aware of contextual errors**, of how their social situation can alter how well they can follow through with the plan. We are trained to follow guidelines and use decision aids, but you have to make sure the plan takes into account the specifics of a person's life. Can they afford the meds you are prescribing? Do they have responsibilities to others that make it so they can't be in a hospital or nursing home? Do they have transportation to the consultant you want them to see?

7) **Be mindful of cultural issues** as well.

8) It can help to **create a PHP template** you can follow. There are some examples in the next few pages of this binder.

9) **Have clinical tools and educational materials on hand** to help with education and skill building. This saves time, and it helps patients understand more fully.

10) ALWAYS take some time, even if it is brief, to **focus on the positives**. Note what they are doing right. Help them identify their assets.

11) One of the best ways to learn how to create a PHP is to **create your own PHP** (hmm, that is exactly what you are doing, isn't it?)

12) **Compare notes with your colleagues**. What are their PHPs like?

> For more information on writing health plans, see the third module on the Whole Health Library Website at
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> http://projects.hsl.wisc.edu/SERVICE/